

QUICK INFO CHECKLIST

For STATE of CALIFORNIA TRAINING PROFESSIONALS

Acknowledgements

The check lists below were prepared with the generous contributions from many training professionals working in many different agencies within California State government.

There are no secrets to success--don't waste time looking for them. Success is the result of perfection, hard work, learning from failure, loyalty to those for whom you work, and persistence." -- General Colin Powell, U.S. Army (Retired)

Though there may be no secrets to success, we could not resist offering State training professionals these checklists of useful skills, knowledge, and tips to help you build the future instead of spending valuable time trying to reinvent the wheel. Your own organization and your role in that organization will determine which topics are relevant to you now, which topics will enhance your knowledge, and which topics may be of value to you in the future.

Roles of Training Professionals in State Agencies

- ☐ Training coordinator
- ☐ Training specialist
- ☐ Training officer
- ☐ Training manager
- ☐ Training chief

Core Skills Needed By All

- ☐ Completed Staff Work
- ☐ Active Listening
- ☐ Effective Oral Expression
- ☐ Effective Writing
- ☐ Analytical Processes
- ☐ Identify and Locate Resources
- ☐ Interpret, Use, and Present Data Effectively
- ☐ Ability to Work Collaboratively

Core Knowledge Factors Needed By All

- ☐ Role of Training in the Organization
- ☐ Principles of Needs Assessment
- ☐ Laws, Rules, and Policies about Training in the State of California
- ☐ Servicewide Training Requirements
- ☐ Bargaining Unit agreement clauses regarding training issues
www.dpa.ca.gov/collbarg/contract/bumenu.shtm
- ☐ Principles of Adult Learning
- ☐ Principles of Criterion Referenced Instruction
- ☐ Levels of Course Evaluation

Additional Core Skills and Knowledge Factors for Every Training Officer/Manager

- ☐ Analyze Essential Functions of a Task
- ☐ Perform a Needs Assessment
- ☐ Prepare Instructional Objectives
- ☐ Be an Agent for Performance Enhancement
- ☐ Instructional Systems Design www.nwlink.com/~donclark/hrd/sat.html
- ☐ Lesson Plan Development www.lessonplanspage.com/WriteLessonPlan.htm
- ☐ Effective Problem Solving
- ☐ Contract Administration
- ☐ Budget Preparation
- ☐ Presentation Skills
- ☐ Computer Literacy
- ☐ Facilitate Team Activities
- ☐ Critical Thinking
- ☐ Resourcefulness
- ☐ Guidelines for developing a training policy, training plan, and evaluations
www.dpa.ca.gov/tcid/stc/policy/policy0.shtm

Desirable Skills that Identify the Successful Training Officer/Manager

- ☐ Organizational Awareness
- ☐ Project Management
- ☐ Leadership
- ☐ Consulting
- ☐ Effective Intervention in Group Processes
- ☐ Cost-Benefit Analysis
- ☐ Theoretical Comprehension

MORE CHECKLISTS FOR TRAINERS

General

- ☐ Training plans/policies/laws/guidelines
- ☐ Understand the organization's needs
- ☐ Recommend solutions that meet the organization's business need
- ☐ Effective application of different training methods
- ☐ Recommend/market training solutions to your customers
- ☐ Effective research methods
- ☐ Effective record keeping of training data
- ☐ The training request process, registration, and forms
- ☐ Conduct training
- ☐ Evaluate training
- ☐ Training projects
- ☐ Orientation program development

Planning

- ☐ Identify the target audience and its needs
- ☐ Consultation
- ☐ Effective use of Individual Development Plans and/or Individual Training Plans
- ☐ Identify existing classes (classroom, virtual classroom, e-learning)

- ☐ Program design
- ☐ Plan, organize, direct, and coordinate training programs
- ☐ Determine procurement method to be used (for out-sourced solutions)
- ☐ Determine timelines for tasks
- ☐ Identify subject matter experts
- ☐ Identify resources for innovative teaching techniques, methods, and practices
- ☐ Recruit instructors
- ☐ Effective use of requests for proposals and State contracts
- ☐ Design appropriate assessment tools (exams)
- ☐ Consider contingency plans in the event of failure of equipment or speakers
- ☐ Get authorization to use copyrighted material, if necessary
- ☐ Design and publish criteria for instructor and program evaluation
- ☐ Schedule classes, calendar
- ☐ Develop course catalog
- ☐ Curriculum development
- ☐ Acquire/develop instructional material
- ☐ Update course material

Training Program

- ☐ Deliver and evaluate a pilot program
- ☐ Modify program as needed
- ☐ Implement evaluation process
- ☐ Assess student progress in skill development
- ☐ Use job performance assessment to help determine effectiveness of training
- ☐ Verify that course curriculum meets the desired objectives
- ☐ Fiscal issues - accounting, budget, planning
- ☐ Calculate return on investment (ROI)

Logistics For Course Coordination

- ☐ Instructor and speaker selection and procurement
- ☐ Facility reservation and coordination (availability/cost/ locations/ reservations/ ADA/ security/ equipment/contacts)
- ☐ Provide and support appropriate audio-visual equipment
- ☐ Provide process for Continuing Education Units (CEU), if applicable
- ☐ Determine class minimum and maximum number of students
- ☐ Register participants
- ☐ Provide confirmation information, parking information, and directions
- ☐ Prepare and duplicate student handouts/manuals/books
- ☐ Course facilitation
- ☐ Classroom setup
- ☐ Sign in Sheet
- ☐ Housekeeping information, e.g., restrooms, water, coffee, food, policy on drinks in classroom, lodging, etc
- ☐ Costs
- ☐ Evaluations
- ☐ Certificates
- ☐ Keep appropriate training records
- ☐ Authorize payment of invoice for purchased services

- Follow-up with evaluations (level 3, level 4, level 5)
- Provide periodic reports on training to management according to their needs

Technical

- Develop visual aids
- Develop instructional presentations using electronic applications
- Design interactive courseware (ie CD-ROM, e-learning applications)
- Distance learning resources
- Technical support for instructors or presenters
- Research instructional videos
- Design instructional videos

Professional Enhancement

- Department of Personnel Administration (DPA) web site
www.dpa.ca.gov/tcid/tcidmain.shtm
- Department Training Officer (DTO) Quarterly Meetings and DTO Home Page
www.dpa.ca.gov/tcid/dto/dtomain.shtm
- CA-Trainers listserv
www.learning.ca.gov/ca-trainers.html
- Sacramento Intergovernmental Training Council (SITC)
- TRDEV International Trainers listserv <http://groups.yahoo.com/group/trdev/>
- American Society for Training and Development (ASTD) www.astd.org
- American Society for Training and Development, Sacramento Chapter (ASTD)
www.astdsac.org/
- Toastmasters International
- Liaison with stakeholders - workforce, partners, administrators, industry specific, government entities, suppliers, educators, etc.
- State Training Center (STC) "Orientation to the Training Function" class
www.dpa.ca.gov/tcid/stc/courses/stc901.htm
- STC virtual classroom (e-learning) www.dpa.ca.gov/tcid/stc/virtual/virtual1.shtm
- STC 24/7 web-based training www.dpa.ca.gov/tcid/stc/virtual/ssmenu.shtm
- STC training for trainer classes
<http://www.dpa.ca.gov/tcid/stc/courses/index2.htm#Training>
- STC "Performance Consulting" class www.dpa.ca.gov/tcid/stc/courses/stc910.htm
- DPA Training Conference/Training Institute
- Sacramento Intergovernmental Training Committee (SITC) workshops
- DPA Office of Statewide Continuous improvement
www.dpa.ca.gov/tcid/osci/osci.shtm
- The State Library "Employee and Training and Development" list at
www.lib.state.ca.us/Web2/tramp2.exe/log_in?quest&SETTING_KEY=English&screen=special_resources.html
- Training Registry identifies training providers, facilities, etc.
<http://www.trainingregistry.com/>

Core Competencies for Human Resource Development Success*

Technical Competencies

- Adult Learning Understanding: knowing how adults acquire and use knowledge, skills, attitudes; understanding individual differences in learning.
- Competency Identification Skill: identifying the knowledge and skill requirements of jobs, tasks, and roles, *and projects (such as in staffing proposals, etc.)*.
- Computer Competence: understanding and/or using computer applications, *in particular Word Processing and Email programs specific to organization..*
- Objectives Preparation Skill: preparing clear statements, which describe desired outputs, *such as deliverables, statements of work, etc.*

Business Competencies

- Business Understanding: knowing how the functions of a business work and relate to each other; knowing the economic impact of business decisions. *Knowing what the other branches do and how we can support them. Knowing what our Dept and programs do.*
- Organization Behavior Understanding: seeing organizations as dynamic, political, economic, and social systems which have multiple goals; using this larger perspective as a framework for understanding and influencing events and change.
- Project Management Skill: planning, organizing, and monitoring work; *workplans, task lists, statements of work, etc.*

Interpersonal Competencies

- Coaching Skill: helping individuals recognize and understand personal needs, values, problems, alternatives, and goals; *may help other team members understand above.*
- Feedback Skill: communicating information, opinions, observations, and conclusions so that they are understood and can be acted upon.
- Group Process Skill: influencing groups so that tasks, relationships, and individual needs are addressed, *such as facilitating and/or team building.*
- Negotiation Skill: securing win-win agreements while successfully representing a special interest in a decision; *as a team member or with customers.*
- Presentation Skill: presenting information orally so that an intended purpose is achieved.
- Questioning Skill: gathering information from stimulating insight in individuals and groups through use of interviews, questionnaires, and other probing methods *to determine customers needs.*
- Relationship Building Skill: establishing relationships and networks across a broad range of people and groups, *teamwork skills and customer relationships.*
- Writing Skill: preparing written material that follows generally accepted rules of style and form, is appropriate for the audience, is creative, and accomplishes its intended purpose.

Intellectual Competencies

- Information Search Skill: gathering information from printed and other recorded sources; identifying and using information specialists and reference services and aids.
- Observing Skill: recognizing objectively what is happening in or across situations.
- Self-Knowledge: knowing one's personal values, needs, interests, style, and competencies and their effects on others

* Core competencies for HRD success as identified by ASTD. Used by permission. *Italics identify expansion of ASTD definition by a Training team within EDD.*